# SIS 2000+ Training Manual

## Entering Food Service Items

### *Purpose*

This program is used to enter food items into the system.  Two type of food items are used in Food Services:

1. Meal Items, which may be Lunch, Breakfast, or Milk (if Milk is treated as a potentially reimbursable item *and* a rate has been set in the Rates module).
2. ala Carte items

If a food item is identified as a Meal Item, then that food item uses pre-defined rates as present in the Rates module.  It is a *potentially* reimbursable item (based upon the consumer).  Meal Item sales appear on Detail and Summary Meal reports.

A Meal Item also has an additional capability.  You may choose to override preset Meal Rates and assign an Override Rate to a specific Meal Item, designating specific consumer types to whom the override rate applies.

Ala Carte food items *do not* reference Rates for the price.  Each ala Carte item requires a price to be specified in Items.  Ala Carte items sales appear in Detail and Summary ala Carte reports.

Food Item availability may be set as District-wide, per School Type, per School, and per Meal. Items utilize Rate Change records, which permits prices to change mid-year while retaining historical reporting accuracy.

**Important\*\***  If *Replication* is to be implemented, **Rates** and **Items** *MUST* be completed using the District-wide database only.

### *Prerequisites*

Meal Rates must be present in the Food Service Rates module.

### *Training Objectives*

Enter Meal Items
Enter ala Carte Items
Enter ala Carte Item prices
Understand Item Rate Change records
Understand how to change an Item rate mid-year
Create an Override Meal Rate Item. Understand when this type of Item is appropriate
Create Banquet Sales/Catering ala Carte Item

# *Accessing Food Service Items*

From the SchoolNet Main Menu, click on the Food Service button.  From the Food Service menu, click on the **Items** button (or Alt-I on the keyboard).

For further information refer to Help:

Available through the NeTel website at:
http://www.netel.com/webdoc/default.htm

## Tasks

### *Enter a Meal Item*

Click on the **New** button from the Items screen.  Use tab to move to each field.
Set **Item type** to Lunch, Breakfast or Milk
   (use Milk only if Milk is present in Rates as a potentially reimbursable Item)
Enter **Item Description**.  This is a user-defined text entry and appears on reports.
**Limit Availability** –
   **Location** determines if this meal is available district-wide, per School type, or per School
   **Meal(s)** determines at which meal this item is available.  Choices are *Lunch*, *Breakfast* or
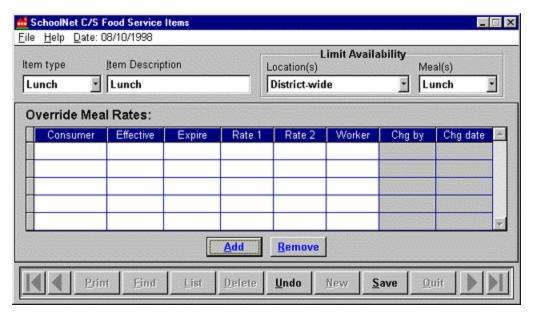   *Unset*, which makes the item available at all meals.
**Save**



Fig. 1 – Meal Item

## _Enter an ala Carte Item_

Click on the **New** button from the Items screen.  Use tab to move to each field.
Set **Item type** to ala Carte
Enter **Item Description**.  This is a user-defined text entry and appears on reports.
**Limit Availability** –
   **Location** determines if this item is available district-wide, per School type, or per School
   **Meal(s)** determines at which meal this item is available.  Choices are _Lunch_, _Breakfast_ or
   _Unset_, which makes the item available at all meals.
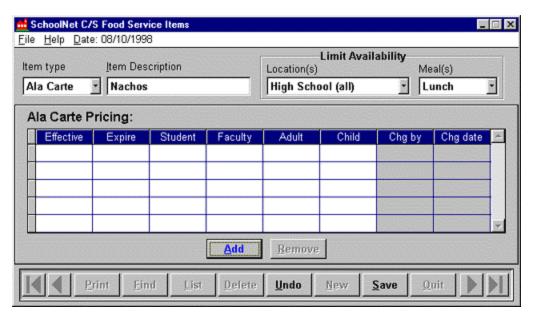   Complete ala Carte Pricing (see below)



Fig. 2 – ala Carte Item, type, description and availability

## Enter ala Carte Item price



```
SchoolNet C/S Food Service Items                                    _ □ ✕
File  Help  Date: 08/10/1998

                                            Limit Availability
Item type      Item Description        Location(s)              Meal(s)
Ala Carte  ▼   Nachos                  High School (all)  ▼     Lunch    ▼

Ala Carte Pricing:
  │ Effective  │ Expire │ Student │ Faculty │ Adult │ Child │ Chg by │ Chg date  │ ▲
  ▶ 08/24/1997 │        │    1.00 │    1.25 │  1.25 │  1.00 │ AdmSy  │ 08/10/1998│
  │            │        │         │         │       │       │        │           │
  │            │        │         │         │       │       │        │           │
  │            │        │         │         │       │       │        │           │
  │            │        │         │         │       │       │        │           │ ▼

                               Add      Remove

  │◀ ◀   Print  Find  List  Delete  Undo  New  Save  Quit  ▶ ▶│
```
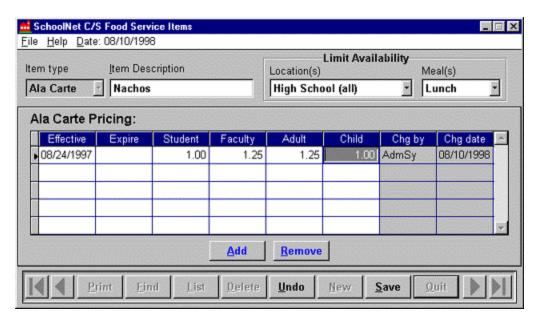
Fig. 3 – ala Carte Item with price

Click on the **Add** button (Ala Carte Pricing).  Use the Tab key to move through the fields.
Enter Effective/Expire Dates
Enter the price for this item for a Student, a Faculty, a Visiting Adult and a Visiting Child
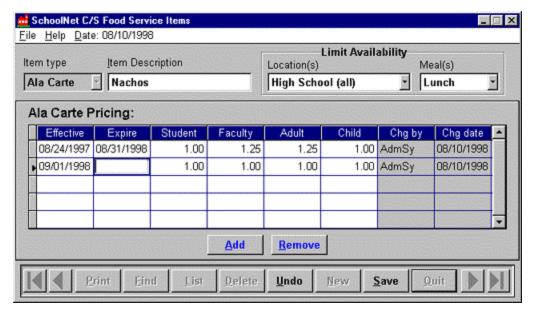**Save**

## *Understand Item Rate Change Records*



Fig. 3 – Complete ala Carte Item, rate change records present

**Rules for Item Rate Change Records:**

> All food Items use Rate Change Records to establish specific time frames (*effective and expire dates*) for each rate.  This allows rates to change mid-year without affecting historical reporting, and also maintains a history for each rate.  A **Meal** Item references Rate Change Records present in the Rates module.  An **Override Rate Meal** Item references Rate Change Records present in the Items module.
>
> The following applies to **Rate Change Records**:
>
>> *Effective* and *Expire* Dates are **not** required <u>unless</u> a rate changes.  If these dates are not present, the system assumes the rate is in effect.
>> If a rate changes, only the *Expire* Date is required to close the current rate.  The Effective Date is optional.
>> To place a new rate in effect, only the new *Effective* Date is required.  The Expire Date for the new rate is optional.

It is recommended that both the *Effective* and *Expire* Dates are included when an Item rate is entered to promote consistency and to avoid inadvertently using an incorrect rate at the start of a new school year.  Also, assigning both dates to a rate produces concise Items Rates Reports with clearly defined periods of coverage for each rate (Fig. 3).

## *How to change an Item Rate mid-year*

Locate Item
 Click on the **Find** button to run the Find Item utility
 Locate the food Item
 Click on the **Edit** button
 Close current rate by entering an Expire Date
 Click on the **Add** button
 Complete the new rate
  Effective Date
  Expire Date
  New Student, Faculty, Adult, Child prices
**Save**

## *Create an Override Meal Rate Item - Override the Pre-defined Meal Rate*

Create a Meal Item (see Enter a Meal Item, Fig. 1)
Complete **Override Meal Pricing**
 Click on the **Add** button (Override Meal Rates grid) to activate a rate row
 Select **Consumer Type** for this item. An Override Meal Rate Item may contain multiple consumer types (Figs. 4, 5).
 Complete **Effective/Expire** Dates
  Complete Rate 1, Rate 2 and Worker Rate for this consumer type.  This Override Rate meal will reference these rates and effective dates, instead of using the rates present in the Rates module.
Click on **Add** again if you need to create a rate for an additional consumer type
Click on the **Save** button

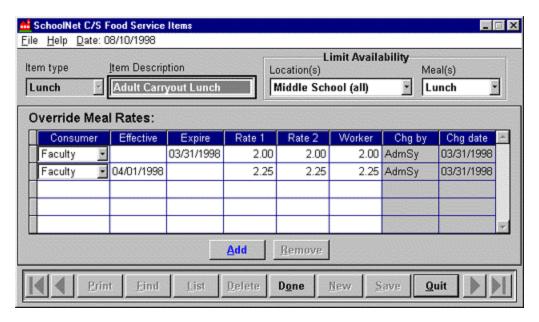## *Create an Override Meal Rate Item - Override the Pre-defined Meal Rate*
(continued)

| SchoolNet C/S Food Service Items | | | | | | | |
|---|---|---|---|---|---|---|---|

File   Help   Date: 08/10/1998

**Item type**: Lunch   **Item Description**: Adult Carryout Lunch   **Limit Availability** — **Location(s)**: Middle School (all)   **Meal(s)**: Lunch

**Override Meal Rates:**

| Consumer | Effective | Expire | Rate 1 | Rate 2 | Worker | Chg by | Chg date |
|---|---|---|---|---|---|---|---|
| Faculty | | 03/31/1998 | 2.00 | 2.00 | 2.00 | AdmSy | 03/31/1998 |
| Faculty | 04/01/1998 | | 2.25 | 2.25 | 2.25 | AdmSy | 03/31/1998 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Add   Remove

Print   Find   List   Delete   **Done**   New   Save   **Quit**

Fig. 4 – Override Meal Rate, single consumer type, rate change records present

| SchoolNet C/S Food Service Items | | | | | | | |
|---|---|---|---|---|---|---|---|

File   Help   Date: 08/10/1998

**Item type**: Lunch   **Item Description**: Adult Chef Salad   **Limit Availability** — **Location(s)**: High School (all)   **Meal(s)**: Lunch

**Override Meal Rates:**

| Consumer | Effective | Expire | Rate 1 | Rate 2 | Worker | Chg by | Chg date |
|---|---|---|---|---|---|---|---|
| Faculty | | | 2.75 | 2.75 | 2.75 | AdmSy | 08/10/1998 |
| Adult | | | 2.75 | 2.75 | 2.75 | AdmSy | 08/10/1998 |
| Child | | | 2.75 | 2.75 | 2.75 | AdmSy | 08/10/1998 |
| | | | | | | | |
| | | | | | | | |

Add   Remove

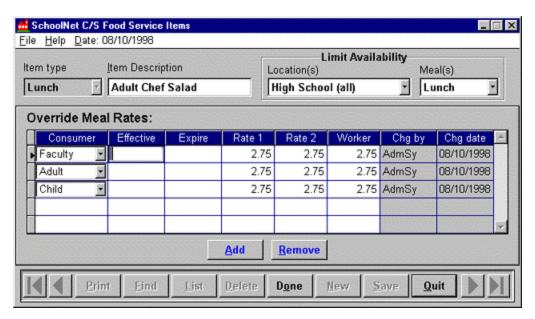Print   Find   List   Delete   **Done**   New   Save   **Quit**

Fig. 5 – Override Meal Rate, multiple consumer types, no Rate Change Records present

## *Create a Banquet Sales/Catering ala Carte Item*

This procedure produces a generic ala Carte Banquet Sales Food Item to permit flexible pricing. More than one item of this type may be present if each item name is unique.  You may wish to create a *Banquet Sales* item and a *Concessions* item for example.

Click on the **New** button

    Complete Item Information
        **Item type** set as ala Carte
        **Item Description** (ex. Banquet Sales or Catering)
        **Limit Availability**
            **Location(s)** as appropriate
            **Meal(s)** set as Unset

Complete ala Carte Pricing

    Click on the pricing **Add** button
    Omit **Effective/Expire** Dates
    **Prices** - Student, Faculty, Adult & Child prices for this item remain as "**0.00**".  The "each" price of a Banquet Sales item is determined when service is recorded in Volume Sales (Cafeteria module).
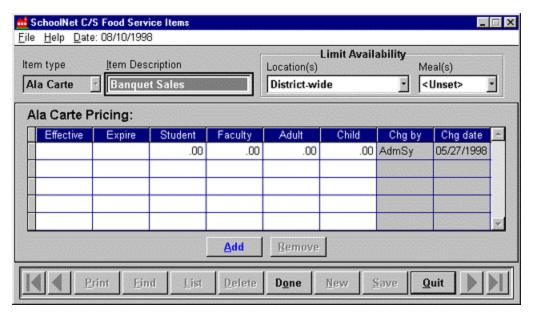**Save**



Fig. 6 – Banquet Sales Food Item